31st Annual Edition

Newspaper and Newsprint Facts at a Glance 1988-89

Newsprint Information Committee
420 Lexington Avenue
New York, N.Y. 10017

Canadian Pacific Forest Products

Fletcher Challenge Canada

Kruger

Maclaren

MacMillan Bloedel

Quebec and Ontario Paper

Rothesay Paper

To The Reader:

The Canadian newsprint producers who make up the Newsprint Information Committee are pleased to bring you this, the thirty-first annual edition of Newspaper and Newsprint Facts at a Glance.

We hope you will find this compendium of information about the newspaper and newsprint industries useful.

If you have any suggestions concerning material in this booklet, we would welcome them.

A list of the Canadian newsprint producers constituting the Newsprint Information Committee appears on the following page.

THE NEWSPRINT INFORMATION COMMITTEE

Members of the Newsprint Information Committee and their service representatives in the United States:

Canadian Pacific Forest Products Ltd.
Canadian Pacific Forest Products Inc.

Fletcher Challenge Canada Ltd.
Fletcher Challenge Paper Company

Kruger Inc.
Kruger Pulp and Paper Sales, Inc.

James Maclaren Industries Inc.

MacMillan Bloedel Limited
Powell River-Alberni Sales Corp.

Quebec and Ontario Paper Company Ltd.

Rothesay Paper Ltd.
Irving Forest Products, Inc.

NEWSPRINT INFORMATION COMMITTEE
420 Lexington Avenue, New York, NY 10017
(212) 697-5600

1989 NEWSPRINT CAPACITY • BY PRODUCERS

Canadian Mills	1989 Capacity* in Metric Tons	
Abitibi-Price Inc. (Group Total)		1,630,000
Alma, Que.	134,000	
Beaupre, Que.	33,000	
Chandler, Que.	207,000	
Fort William, Ont.	141,000	
Grand Falls, Nfld.	247,000	
Iroquois Falls, Ont.	255,000	
Kenogami, Que.	111,000	
Pine Falls, Man.	174,000	
Stephenville, Nfld.	163,000	
Thunder Bay, Ont.	165,000	
Boise Cascade Canada Ltd.		
Kenora, Ont.		227,000
Bowater Mersey		
Liverpool, N.S.		224,000
Canadian Pacific Forest Products		
Limited (Group Total)		1,530,000
Dalhousie, N.B.	284,000	
Gatineau, Que.	557,000	
Gold River, B.C.	27,000	
Thunder Bay, Ont.	405,000	
Trois-Rivieres, Que.	257,000	
Consolidated-Bathurst Inc. (Group Total)		953,000
Grand' Mere, Que.	186,000	
Port Alfred, Que.	374,000	
Shawinigan Falls, Que.	313,000	
Trois-Rivieres, Que.	80,000	
Daishowa Forest Products Ltd., Quebec, Que.		452,000
Domtar Inc. (Group Total)		269,000
Dolbeau, Que.	153,000	
Donnacona, Que.	46,000	
Red Rock, Ont.	70,000	

*Preliminary

Canadian Mills (cont.)	1989 Capacity* in Metric Tons	
Donohue Inc. (Group Total)		524,000
Amos, Que.	176,000	
Clermont, Que.	348,000	
Fletcher Challenge Canada Limited (Group Total)		1,118,000
Crofton, B.C.	480,000	
Elk Falls, B.C.	505,000	
Mackenzie, B.C.	135,000	
Kruger Inc. (Group Total)		790,000
Bromptonville, Que.	200,000	
Corner Brook, Nfld.	344,000	
Trois-Rivieres, Que.	246,000	
James Maclaren Industries Inc. Buckingham, Que.		187,000
MacMillan Bloedel Ltd. (Group Total)		622,000
Port Alberni, B.C.	146,000	
Powell River, B.C.	476,000	
Quebec and Ontario Paper Company Ltd. (Group Total)		761,000
Baie Comeau, Que.	451,000	
Thorold, Ont.	310,000	
Rothesay Paper Ltd. Saint John, N.B.		320,000
St. Raymond Paper Ltd. St. Raymond, Que.		33,000
F. F. Soucy Inc., Riviere-du-Loup, Que.		170,000
Spruce Falls Power & Paper Co. Ltd. Kapuskasing, Ont.		343,000
Stora Forest Industries Point Tupper, N.S.		170,000
TOTAL CANADIAN CAPACITY		10,325,000

*Preliminary
Source: Canadian Pulp & Paper Assn.

United States Mills	1989 Capacity* in Metric Tons	
Augusta Newsprint Co., Augusta, GA.		349,000
Bear Island Paper Co., Ashland, VA.		203,000
Boise Cascade Corp., (Group Total)		523,400
DeRidder, LA.	336,000	
Steilacoom, WA.	187,400	

United States Mills (cont.)	1989 Capacity* in Metric Tons	
Bowater Inc. (Group Total)		943,000
Calhoun, TN	718,000	
Catawba, SC	225,000	
Champion International (Group Total)		778,000
Lufkin, TX	349,000	
Sheldon, TX	429,000	
FSC Paper Co. L.P., Alsip, IL		121,500
Garden State Paper Co., Inc., Garfield, NJ		199,500
Golden State Newsprint Co., Inc., Pomona, CA		122,500
Great Northern Paper Co.		
E. Millinocket, ME		318,000
Inland Empire Paper Co., Millwood, WA		66,000
James River Corp., Wauna, OR		30,000
Kimberly-Clark Corp., Coosa River Newsprint Div.		
Coosa Pines, AL		380,000
Manistique Papers, Inc.		
Manistique, MI		56,000
Newsprint South, Inc., Grenada, MS		60,000**
North Pacific Paper Co., Longview, WA		474,000
Ponderay Newsprint Co., Usk, WA		20,000**
Smurfit Newsprint Corp. (Group Total)		567,000
Newberg, OR	350,000	
Oregon City, OR	217,000	
Southeast Paper Manufacturing Co., Dublin, GA		212,000
Stone Container Corp.		
Snowflake, AZ		264,100
TOTAL U.S. CAPACITY		5,687,000

*Preliminary
**Portion only during 1989.
Source: American Paper Institute and
American Newspaper Publishers Assn.

NORTH AMERICAN NEWSPRINT
CAPACITY, PRODUCTION, CONSUMPTION, SOURCES OF SUPPLY

Sources: ANPA, Canadian Pulp & Paper Assn., API

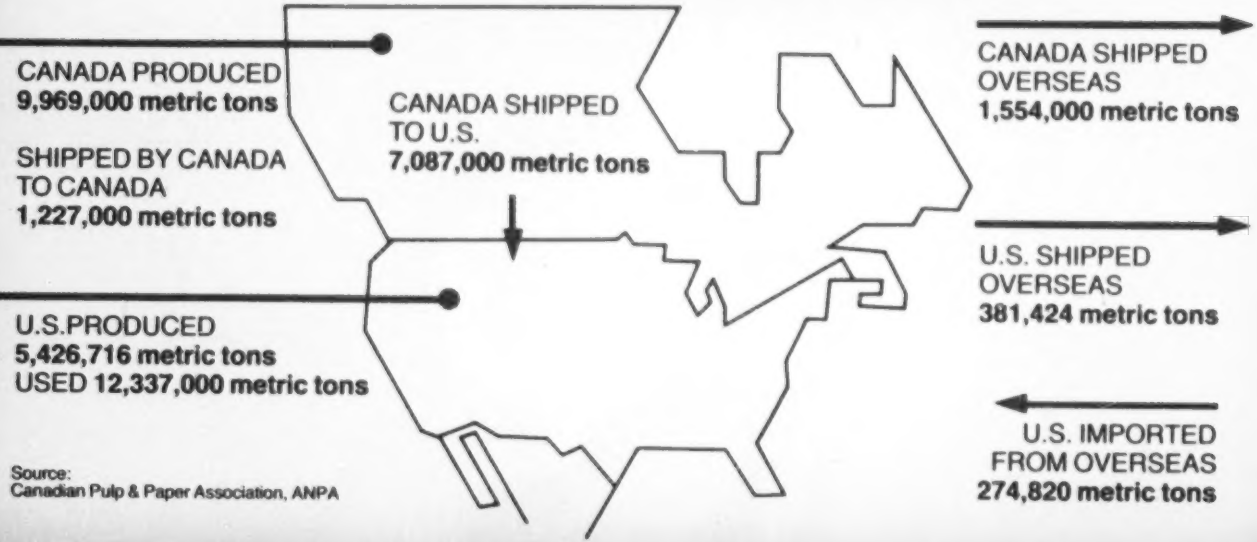
	1989[1,3] Metric Tons	1988[3] Metric Tons	1979[3] Metric Tons	1969[4] Metric Tons
CAPACITY				
U.S. Mills	5,687,000	5,543,000	3,809,000	3,061,000
Canadian Mills	10,325,000	10,085,000	9,063,000	8,942,000
	16,012,000	15,628,000	12,872,000	12,003,000
PRODUCTION				
U.S. Mills		5,426,716	3,685,000	3,050,000
Canadian Mills		9,969,000	8,756,000	8,000,000
		15,395,716	12,441,000	11,050,000
U.S. CONSUMPTION				
By all Users		12,337,000	10,199,000	8,940,000
By Daily & Sunday Newspapers		9,050,472[2]	7,877,657	7,556,694
% of total consumption		73.4%[2]	77.2%	84.5%
U.S. SOURCES OF SUPPLY				
From Canada		57.2%	63%	64%
From U.S.		40.6%	36%	33%
From Overseas		2.2%	1%	3%

NOT AVAILABLE

1. Preliminary. 2. See footnote, page 15. 3. Calculations are based on 30 lb newsprint basis weight. 4. Calculations are based on 32 lb newsprint basis weight.

To convert metric tons to short tons, multiply by 1.1023.

FLOW OF NORTH AMERICAN NEWSPRINT, 1988



Source:
Canadian Pulp & Paper Association, ANPA

CANADA LEADS WORLD IN NEWSPRINT PRODUCTION

Source: CPPA

1988
Production, 000's*

Nation	Metric Tons	Percent of Total
Canada	9,969	31.3
United States	5,427	17.0
Japan	3,065	9.6
Sweden	2,073	6.5
U.S.S.R.**	1,750	5.5
Finland	1,275	4.0
West Germany	897	2.8
Norway	811	2.5
Britain	530	1.7
Australia	439	1.4

*Preliminary
**Estimated
Total World Production (1988 Est.)—31,882,000 metric tons
(Total includes Peoples' Republic of China.)

U.S. IS WORLD'S LEADER IN NEWSPRINT DEMAND

Source: CPPA

1988
Demand, 000's*

Nation	Metric Tons	Percent of Total
United States	12,395	39.1
Japan	3,361	10.6
Britain	1,871	5.9
West Germany	1,457	4.6
U.S.S.R**	1,405	4.4
Canada	1,227	3.9
France	763	2.4
Australia	722	2.3
India	524	1.7
China**	506	1.6
Italy	501	1.6

*Preliminary
**Estimated
Total World Demand (1988 Est.)—31,668,000 metric tons
(Total includes Peoples' Republic of China.)

THE PRICE OF NEWSPRINT—1938–1988*

	Short Tons
1938	$ 50.00
1939	50.00
1940	50.00
1941	50.00
1942	50.00
1943	54.66
1944	58.00
1945	60.25
1946	72.25
1947	88.50
1948	97.67
1949	100.00
1950	101.00
1951	111.00
1952	121.00
1953	126.00
1954	126.00
1955	126.00
1956	130.00
1957	133.00
1958	134.00
1959	134.00
1960	134.00
1961	134.00
1962	134.00
1963	134.00
1964	134.00
1965	$134.00
1966	136.92
1967	140.50
1968	142.00
1969	147.00
1970	152.00
1971	157.33
1972	164.58
1973	175.00
1974	210.00
1975	260.00
1976	282.50
1977	302.50
1978	320.00
Metric Tons	
1979	$386.11
1980	436.50
1981	482.50
1982	495.00
1983	484.25
1984	515.40
1985	535.00
1986	543.75
1987	590.00
1988	650.00

*Annual average contract price per ton delivered at New York City. Prices through 1973 are for 32-lb. paper; thereafter for 30-lb. One metric ton equals 1.1023 short tons.

NEWSPRINT AS AN ELEMENT OF TOTAL PUBLISHING COST

Typical dailies	1987	1988
Daily of 1,000,000 + circulation	24.1%	25.7%
Daily of 250,000 circulation	25.6%	26.3%
Daily of 50,000 circulation	20.9%	21.8%
Daily of 9,000 circulation	13.5%	13.9%

(85% of all dailies have less than 50,000 circulation)

U.S. NEWSPRINT CONSUMPTION

1958-1988

Year	Short Tons (Thousands)	Year	Short Tons (Thousands)
1958	6,229	1975	9,172
1959	6,704	1976	9,577
1960	6,962	1977	10,228
1961	6,919	1978	10,878
1962	7,018		
1963	7,075		
1964	7,539	Year	Metric Tons (Thousands)
1965	8,016	1979	10,199
1966	8,580	1980	10,088
1967	8,660	1981	10,164
1968	8,744	1982	10,108
1969	9,239	1983	10,589
1970	9,117	1984	11,431
1971	9,248	1985	11,587
1972	9,938	1986	11,937
1973	10,195	1987	12,323
1974	10,102	1988	12,337

Source: ANPA, CPPA

Note: Tonnage for years prior to 1974 has been recalculated to a 30-pound basis for comparative purposes.
To convert short tons to metric tons, divide short tons by 1.1023.

NEWSPRINT MISCELLANY

Basis Weight/Grammage

The weight in pounds of a ream (500 sheets) of newsprint 24 by 36 inches (equal to 3,000 square feet) is its basis weight. Virtually all U.S. and Canadian newsprint capacity is on a nominal 30-lb. basis weight standard. In metric terms, this is expressed as grammage, or the weight in grams of one sheet of newsprint measuring one square meter. Thus a 30-lb. basis weight is equivalent to a grammage of 48.8 (more frequently expressed as 48.8 g/m^2).

Basis weight/grammage conversion tables appear on page 27.

Newsprint Storage

ANPA/RI recommends storing newsprint at a temperature of 60° to 70° F. Newsprint that has been in transit under frigid conditions should be kept in a warm storage room several weeks before it is used on press.

Unwound newsprint gives up or takes on moisture in seconds; therefore, says ANPA/RI, most experts recommend that the pressroom environment be maintained at 45 percent relative humidity. Many newspapers have humidity control devices in their pressroom air handling systems or supplemental humidity units operating in the pressroom areas. Proper humidity conditions definitely aid runability.

Newsprint and Environment

Wood for newsprint is a renewable natural resource. In Canada, it comes from nearly a million square miles of forest, 80 percent owned by the public. Wood is harvested in accordance with rules laid down by the provincial governments.

The forests are managed so as to give perpetual yield. The annual cut is far less than annual growth. Thus the current wood supply can be maintained in perpetuity. Mature trees left unharvested fall prey to fire, insects, disease, and decay.

Canadian mills are involved in a costly long-term anti-pollution program. Meanwhile, both government and industry researchers continue to seek improved methods of waste disposal.

Over four and a half million tons of old newspapers are collected annually in the U.S. for recycling in the U.S. and overseas, according to the American Paper Institute. They go into such products as paperboard, wallboard, insulation and more than 1.4 million tons of reprocessed newsprint.

DATA ON U.S. NEWSPAPERS

U.S. Daily Newspaper Circulation[1]	1988	1987	1978
Morning Newspapers[2]	40,452,815	39,123,807	27,656,739
Evening Newspapers[2]	22,242,001	23,702,466	34,333,258
Total Dailies	62,694,816[3]	62,826,273	61,989,997
U.S. Sunday Newspapers	61,474,189[1,4]	60,111,863	53,990,033
U.S. Weekly Newspapers	51,691,451[5]	47,593,000	40,243,795
Average Pages Printed[6,7]			
U.S. Dailies			
A.M. Papers	100	94	64
P.M. Papers	84	78	56
Sunday Papers	365	351	196
Advertising Expenditures			
U.S. Daily and Sunday Newspapers[6]	$31,197,000,000	$29,412,000,000	$12,213,000,000

1. Editor & Publisher. 2. 1988 figures for 529 morning and 1,141 evening dailies. 3. 1,642 total dailies; 28 "all-day" newspapers are counted in a.m. and p.m. figures, but only once in the total. 4. 840 Sunday newspapers. 5. ANPA; 7,498 weekly newspapers; includes paid and free circulation newspapers. 6. Newspaper Advertising Bureau. 7. Includes preprints on a linage basis.

LARGEST U.S. DAILIES

Circulation[1]		1988 Newsprint Usage[2] (Metric Tons)
1,931,410	The Wall Street Journal (m)[3]	155,054
1,341,811	USA Today (m)[3,4]	150,000
1,230,186	New York Daily News (m)	170,291
1,119,840	Los Angeles Times (m)	413,669
1,117,376	The New York Times (m)[3]	339,000
812,419	The Washington Post (m)	250,000
740,154	Chicago Tribune (m)	209,719
697,509	Newsday (all day)	160,236
676,025	The Detroit News (all day)	125,315
629,275	Detroit Free Press (m)	90,004

1. ABC FAS-FAX figures as of March 31, 1989. Source: Audit Bureau of Circulations.
2. Independent verification.
3. National edition.
4. For the period ending Mar. 31, 1988, USA Today's circulation included its Monday through Thursday edition and its Friday (weekend) edition. For the period ending Mar. 31, 1989, USA Today's circulation for its Monday through Thursday edition was 1,341,811. For its Friday (weekend) edition—reported separately for the first time—circulation was 1,669,121.

LARGEST U.S. NEWSPAPER COMPANIES (Ranked by Daily Circulation)

Company	Daily Papers	Daily Circulation[1]	Sunday Papers	Sunday Circulation[1]
Gannett Co.	84	6,058,564	65	5,654,755
Knight-Ridder Newspapers	28	3,864,620	25	4,876,754
Newhouse Newspapers	26	3,030,351	21	3,540,259
Tribune Co.	9	2,707,147	7	3,595,987
Times Mirror	7	2,625,790	7	3,162,732
Dow Jones	24	2,498,270	13	458,281
New York Times Co.	27	2,016,317	16	2,443,131
Thomson Newspapers	118	1,947,573	61	1,437,531
Scripps-Howard Newspapers	21	1,605,990	11	1,780,628
Hearst Newspapers	14	1,446,825	11	2,543,417

1. Average for six months ended March 31, 1989.
Source: Morton Research, Lynch, Jones & Ryan.

NEWSPAPER NEWSPRINT CONSUMPTION BY STATES*
(Metric Tons)

	1988	1987	Percent Increase/ Decrease
New England States			
Connecticut	116,945	120,126	– 2.6
Maine	27,934	27,079	+ 3.2
Massachusetts	324,994	328,674	– 1.1
New Hampshire	23,409	23,878	– 2.0
Rhode Island	44,155	43,541	+ 1.4
Vermont	9,369	8,523	+ 9.9
Total	546,806	551,821	– 0.9
Middle Atlantic States			
New Jersey	391,788	395,041	– 0.8
New York	934,795	963,030	– 2.9
Pennsylvania	423,572	429,585	– 1.4
Total	1,750,155	1,787,656	– 2.1
South Atlantic States			
Delaware	17,322	18,722	– 7.5
District of Columbia	260,082	254,302	+ 2.3
Florida	613,696	592,030	+ 3.7
Georgia	209,790	208,614	+ 0.6
Maryland	124,154	124,442	– 0.2
North Carolina	171,469	170,114	+ 0.8
South Carolina	72,606	72,988	– 0.5
Virginia	146,644	144,773	+ 1.3
West Virginia	31,381	32,284	– 2.8
Total	1,647,144	1,618,269	+ 1.8
East North Central States			
Illinois	451,592	456,119	– 1.0
Indiana	149,188	148,218	+ 0.7
Michigan	322,040	333,828	– 3.5
Ohio	338,555	345,006	– 1.9
Wisconsin	130,485	130,532	– 0.0
Total	1,391,860	1,413,763	– 1.6
East South Central States			
Alabama	74,994	76,920	– 2.5
Kentucky	70,253	71,442	– 1.7
Mississippi	35,092	35,417	– 0.9
Tennessee	121,824	120,417	+ 1.2
Total	302,163	304,196	– 0.7

	1988	1987	Percent Increase/ Decrease
West North Central States			
Iowa	72,435	74,023	– 2.1
Kansas	41,464	41,935	– 1.1
Minnesota	135,277	135,663	– 0.3
Missouri	173,852	180,190	– 3.5
Nebraska	46,152	46,067	+ 0.2
North Dakota	12,412	13,350	– 7.0
South Dakota	10,843	10,895	– 0.5
Total	492,435	502,123	– 1.9
West South Central States			
Arkansas	63,744	59,697	+ 6.8
Louisiana	109,475	111,279	– 1.6
Oklahoma	71,646	71,216	+ 0.6
Texas	637,495	659,329	– 3.3
Total	882,360	901,521	– 2.1
Mountain States			
Arizona	138,847	146,146	– 5.0
Colorado	180,904	188,544	– 4.1
Idaho	15,371	15,521	– 1.0
Montana	12,418	12,299	+ 1.0
Nevada	46,663	44,799	+ 4.2
New Mexico	26,764	28,986	– 7.7
Utah	33,734	35,202	– 4.2
Wyoming	5,962	6,119	– 2.6
Total	460,663	477,616	– 3.6
Pacific States			
Alaska	16,792	18,155	– 7.5
California	1,297,883	1,285,435	+ 1.0
Hawaii	28,812	30,956	– 6.9
Oregon	94,170	93,806	+ 0.4
Washington	139,229	139,349	– 0.1
Total	1,576,886	1,567,701	+ 0.6
TOTAL U.S.	9,050,472	9,124,666	– 0.8

Source: ANPA

*This ANPA compilation reflects 1988 newsprint consumption by 1,739 dailies as well as some foreign language, college and special service publications such as trade newspapers. The 9,050,472 metric ton total represents 73.4 percent of the estimated total U.S. consumption of 12,337,000 metric tons by all users.

To convert metric tons to short tons, multiply by 1.1023.

RESEARCH FOR NEWSPAPERS

For nearly thirty years, the Canadian newsprint producers of the Newsprint Information Committee have financed research projects in behalf of their customers, the newspapers. By defining the newspaper medium's strengths, the research findings have helped sell tens of millions of dollars worth of newspaper advertising, reports the Newspaper Advertising Bureau.

Some of the research has developed information to help newspapers increase circulation and readership, in addition to advertising. This was the intent of the most recent project, completed in mid-1989, which explored the Teenage Newspaper Audience.

Since 1960, NIC has contributed $850,000 to finance 12 newspaper advertising and readership research projects. Highlights of the Teenage Newspaper Audience study and the 11 previous projects are presented below.

"Today's Teenagers: Tomorrow's Readers"*

Over the past two decades, the level of newspaper reading has slipped with each succeeding generation of young adults. In 1967, 71% of 18-24 years olds reported reading a newspaper on the previous day. By 1988, that figure had fallen to 55%.

The purpose of the study of teenagers was to:

- Examine the comparative attractions of newspapers, other print media, and broadcast programming for teenagers of different social backgrounds;
- Provide editors and circulation executives with ideas that may help build teenage readership.

A national cross-section of 2,089 teenagers was personally interviewed by Simmons Market Research Bureau in spring 1988, and 1,075 of them were queried again in December with a series of followup questions prepared by NAB.

The research showed that 41% of teenagers read the newspaper on an average day, while 16% read the newspaper five out of five weekdays. Sunday, with an average readership of 48%, attracts more teenagers than an average weekday paper.

A positive factor in the survey was the high level of teenagers planning to graduate from high school and attend four-year colleges. Fully 91% plan to graduate from high school and, of these, 60% plan to attend a four-year college. Another 28% say they'll go to a two-year college, and 15% to a vocational school.

Subjects that teenage respondents said they wanted information about include, in order of preference: Jobs and careers; clothes and style; rock music; local high school news; local sports; professional sports; science and space; movies, and cars and motorcycles.

Newspaper reading levels are highest among the 38% of teenagers who report their parents read to them almost every day when they were little. As among adults, the likelihood of newspaper readership by teenagers varies by family income and region. In the top socio-economic bracket, 64% of the teenagers read a newspaper on a typical weekday; in the lowest bracket only 29% do. In that bracket, 50% did not read any paper in the course of a full week.

For teenagers as for adults, advertising is one of the most valuable functions of newspapers. When asked to rate the most helpful source of advertising, newspapers won handily, with a 41% vote, compared to 18% for television, 17% for magazines and 2% for radio.

*A 1988-89 survey by Simmons Market Research Bureau, financed by the Canadian newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"Study of Newspaper Advertising Performance"

One of the continuing tasks in selling newspapers is to persuade advertisers who are television-oriented that the process of communicating in newspapers really is different from the process of getting messages from television.

In this study, 20 newspapers conducted 23 studies of 10 to 15 ads in specific issues of their newspapers.

The project provides hard data on the likelihood that a reader will open the specific page on which an ad appears and on the likelihood that the reader will take an interest in that particular ad.

NAB has found that the average reader sees about 80 percent of a newspaper and that his interest in any one ad is about four times higher if he is a prospective buyer than if he is unlikely to buy the product.

In addition to the readership interviews, the project has included a number of experiments. By measuring the brain activity of readers and tracking their eye movements across the page, the experiments found that the typical person does not so much read a newspaper as scour it for information. The reader's eyes dart, with surprising speed, across the newspaper's pages before pausing to read an item that proves of interest.

This indicates that newspaper reading is a much more dynamic process than previously realized. For advertisers, the findings mean that prospects for their goods and services are the very people most likely to spot their advertisements and then stop to read them.

"Classified Advertising: Its Audience and its Consequences"*

This study focuses on four basic areas of classified advertising: automotive, employment, real estate and general merchandise. The study also deals with home deliveries versus newsstand and vending machine sales, readership of Sunday classified sections, and classified advertising in other sections of the newspaper, such as sports or business-financial.

Findings show that among U.S. adults who read a newspaper on an "average day":

- 24 out of 100 look at employment classified—a 60% increase over a 1971 figure of 15 out of 100.
- 23 out of 100 look at real estate classified—a 15% increase.
- 20 out of 100 look at automotive—another big jump of 67%.
- 28 out of 100 look at general merchandise classifieds—a 40% increase over 1971.
- 10 out of 100 look at recreational or sports equipment classified, and the same number look at classified ads for household services or other services.

On an average day also:

- 7% of adults (11 million people) are "actively looking" for a new job.
- 6% (9 million) are "actively looking" for a car.
- 5% (7.5 million) are seeking to rent a house or apartment.
- 5% (7.5 million) are looking for homes to buy.

The classified studies led to step-by-step marketing programs designed by NAB to show newspapers how they could sell more classified advertising.

*A 1979-80 survey by Response Analysis Corporation, financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"How the Public Gets Its News"*

The most comprehensive of its kind ever made, the study is being used as a guideline by hundreds of newspapers conducting localized research to improve readership.

Here are a few of the scores of findings:

1. Most people want more news in the paper rather than less news and more entertainment.

2. To build circulation, newspapers must focus on the occasional and infrequent readers rather than non-readers.

3. TV newscasts and newspapers are probably not in competition. Newscast viewers and newspaper readers are frequently the same people.

4. Infrequent readers are often poor, young, single, rural, and black.

The study produced fifteen detailed spinoff studies covering such subjects as readership, content, advertising, home delivery and patterns of exposures to the news in the mass media. The titles include:

- News Sources and Interests of Blacks and Whites
- The Personal Newspaper: Public Ratings of 34 Newspaper Subject Areas
- Young Adults and the Newspaper
- Influence of Childhood Exposure to Newspapers on Adult Habits
- Two Dimensions of News: Interest and Importance Ratings of the Editorial Content of the American Press
- Readership and Coverage of Science and Technology in Newspapers
- The Home Delivery Population: Characteristics and Readership Patterns
- The Newspaper Advertising Audience: Public Interest in Advertising and Shopping Behavior
- Identifying Prospects for the Newspaper: Frequent Readers, Infrequent Readers and Nonreaders

* A 1978 survey by Audits & Surveys, Inc., financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"Shoppers on the Move"*

Based on nearly 18,000 interviews in five leading markets across the country, this study charted shoppers' travel patterns. It was designed to aid retailers in planning media strategy for advertising and promotion. The research determined who the shoppers are, how far they drive, and how much they have to spend.

Shopping is a pleasure: Most women shop once a week for general merchandise items; more often than going to church, to a movie, or out to dinner.

Shoppers love to travel: Nearly nine out of 10 shopping visits in all markets were made by car—even half of downtown shopping is by car. Only 33 percent shop mostly in neighborhoods, while 67 percent either range far and wide or divide their shopping equally between nearby and more distant stores.

High income shoppers travel farther: Among families with $15,000 or more a year, 52 percent of shopping

visits are more than five miles from home. For incomes under $10,000, the figure drops to 36 percent.

Under-35s travel farther: Shoppers 18 to 34 years old go five miles or more from home in 49 percent of their shopping visits; in the 35-to-64 age group the figure is 43 percent. These are prime customers.

Shoppers don't plan in advance: 53 percent say they are in the shopping area because of some immediate need, so day-in, day-out advertising is vital.

The market is thin: Even for a very popular item such as personal hosiery, less than 2 percent of all women are in the market on a given day.

Food shopping: This is the most frequent kind of retail shopping. Out of all store visits for all purposes, 41 percent are to supermarkets or food stores. Seven out of ten women make at least one major trip per week, and regular newspaper readers make more major shopping trips than nonreaders do. About half of all women patronize two or more stores over a four-week period. In addition, women do not confine their major food and grocery buying trips to a single shopping area: in the course of four weeks, 24 percent of the shoppers went to two areas for the major food trip, and 8 percent went to three or more.

Movie-going: Overall, 28 percent report attending one or more movies in the last month. Movie-going is most common among the young and the well educated. Nearly two-thirds (64 percent) of all movie-goers attended theaters only outside their own neighborhoods.

Dining out: In the course of a month, 69 percent of the women in this five-city study had at least one evening meal in a restaurant. About half of these dined out three times or more. Over half (55 percent) of those eating out did not patronize restaurants in their own neighborhood, but neighborhood dining is more common in bigger cities than in smaller cities.

How newspaper works: 77 percent of the men and 81 percent of the women said newspapers are "the best kind of store advertising." Three out of four shoppers in the store today read a newspaper yesterday.

* A 1975 survey by Response Analysis Corp., Princeton, N.J., financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"Psychographics of the Newspaper Audience"*

Previous research has established that no matter whether one defines the market for a product in terms of age, income, education, etc., the newspaper has the broadest coverage. Now this is demonstrated as well in

terms of psychographics, a measurement system widely used by ad agencies and national advertisers.

Intensive interviews were conducted with a national sample of 4,000 men and women. The sample was found to divide into 16 psychographic groups, or target audiences, those in each group having similar personalities, life styles, and personal values.

This gives creative guidance for advertisers—how to advertise various product lines so as to appeal to a given group. The study also shows that through newspapers the advertiser can reach these groups more completely than through specialized media.

*A 1973 survey by Behavioral Analysis, Inc., and Commercial Analysts, Inc., financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"What Can One Newspaper Ad Do?"*

One of the largest field experiments ever undertaken to measure advertising effects, this study involved over 2,400 interviews in six typical markets. Chief findings:

1. One national ad in a newspaper has immediate effect on sales of the advertised brand and attitudes toward it.

2. An ad singles out and communicates best to those most likely to be customers.

3. Newspaper advertising is highly efficient in any comparison with television.

More specifically, on the first point: An ad for a particular brand boosts sales for the whole commodity category by 15 percent; increases sales of the advertised brand by 16 percent; increases the brand's share of the market by 10 percent; increases the proportion of those who would pick the brand "next time I buy" by four percent.

*A 1969 survey by Opinion Research Corp. financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"When People Want to Know. . . Where Do They Go to Find Out?"*

Samples of news, editorial and advertising material—some 240 items in all—were culled from the four major media (newspapers, magazines, television and radio). Each item was condensed to a one- or two-sentence description on a flash card. The medium in which it appeared was not identified. Respondents were asked: "Which medium would you turn to to find out more about this subject?" Newspapers were the favored source for

three out of five news and editorial items and three out of five advertising items.

*A 1967 survey by Opinion Research Corporation financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"The Retail Customer: How, When and Where She Shops and Spends"*

This major study charted the dynamics of the retail market from interviews with 10,382 women twice in successive weeks in five cities of varying sizes across the country. Data included buying behavior with respect to 145 kinds of commodities.

1. America's huge volume of retail sales is generated from relatively small percentages of women planning, shopping, and spending in any week.

Only seven out of 100 women interviewed in Week I said they planned to buy a dress soon. Only five out of a hundred shopped for a dress. Only three out of a hundred bought. This means retailers must reach 3,330 women to find those who will buy every 100 dresses sold in a week in all stores in town.

The same principle faces all retailers. In major appliances, only six out of 1,000 women bought in a sample week. Therefore, 16,700 women must be reached to sell every 100 major appliances sold in all stores in town in a week.

2. Priority of items on a customer's "plan-to-buy" list changes constantly. Thus, the retail market changes daily.

Top-of-the-mind readiness to buy ("I plan to buy it soon") accounts for only 26 percent of the general merchandise items that are bought during the shopping week. Three out of four of the 28,474 purchased items were not mentioned as "plan-to-buy-soon" items just one week earlier.

3. The effect of increased newspaper advertising was measured store by store and customer by customer in five categories of merchandise.

Stores which increased their newspaper linage at least 10 percent from Week I to Week II developed a 12 percent greater rate of follow-through from plans to store visits than stores with no linage increase.

*A 1966 survey by Opinion Research Corp., supervised by Newspaper Advertising Bureau, financed by the newsprint companies of the Newsprint Information Committee.

Prospects See Twice as Many National Ads as Non-Prospects*

- Newspapers are read systematically. 82% of the pages carrying national advertising of 100 lines or larger are opened and scanned by the average reader.
- The mass exposure opportunity represented by this 82% page opening is remarkably consistent for men and women of all ages, income, education, and geographical location.
- Because of this high page opening, and allowing for varying ad size, there is no real difference between one product category and another in the likelihood that the reader will open the page carrying the ad, stop, and read something on that part of the page where the ad appears.
- Each reader searches through the newspaper for information that is relevant, interesting, and meaningful to him.
- Real prospects for a product, those who buy a product often and find its use pleasant and interesting, are twice as likely as non-prospects to report seeing and looking for ads.

*Source: "A Study of the Opportunity for Exposure to National Newspaper Advertising" by Audits and Surveys, Inc. for the Newspaper Advertising Bureau, financed by Newsprint Information Committee (1964).

How Editorial Environment Affects Page-Opening, Reading*

Ad Location		Page-Opening		Reading	
Section	Percent of all National advertising which appears in each section	Percent of all readers who open average page		Percent of page openers who read one or more items	
		Men	Women	Men	Women
General News	51%	82%	88%	64%	63%
Sports	18	85	69	60	38
Food, fashion	8	73	88	42	70
Business, finance	4	77	68	54	42
Radio, TV	3	83	80	68	65
Society	2	81	94	43	68
Amusements	2	84	90	62	52
All other	13	80	85	52	60

*Source: "A Study of the Opportunity for Exposure to National Newspaper Advertising" by Audits & Surveys, Inc. for the Newspaper Advertising Bureau, financed by Newsprint Information Committee (1964).

"Repetition in Newspapers"*

Results of an intricate field experiment showed that the more an advertising message is repeated, the more

slowly it will fade from the consumer's memory once the campaign has ended. Sometimes this sustained effect will continue long after the ads have stopped appearing.

*A 1963 survey designed, analyzed and tabulated by the Harvard Business School, financed by the Canadian newsprint companies making up the Newsprint Information Committee, and supervised by the Newspaper Advertising Bureau

"The Daily Newspaper and Its Reading Public"*

This survey revealed that 83 percent of the public have talked about stories they saw first in a newspaper; 53 percent within the past three months had saved an item of some sort from a newspaper; and 28 percent had clipped an advertisement, with more than half of them later buying the advertised product.

*A 1961 survey by Audits and Surveys, Inc., financed by the Canadian newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

HOW U.S. MEDIA SHARED ADVERTISING EXPENDITURES

Source: McCann-Erickson, Inc.
($000,000)

	1988	1987	1978
Newspapers ...	$31,197	$29,412	$12,214
Magazines	6,072	5,607	2,597
Television	25,686	23,904	8,955
Radio	7,798	7,206	3,052
Others.....	47,297	43,521	16,512
TOTAL	$118,050	$109,650	$43,330

All production costs included.

U.S. TREASURY DEPT., CUSTOMS SERVICE TARIFF CLASSIFICATION STANDARD NEWSPRINT PAPER

(Ed. Note: Following is the U.S. Customs Service's description of duty-free standard newsprint, published as Treasury Decision 56349 dated Jan. 28, 1965 and incorporating T.D. 68-265 (20) dated Oct. 1, 1968.)

The test for determining whether a paper is classifiable as standard newsprint paper under

Item 252.65 is whether at the time of its importation the paper is of that class or kind chiefly used in the United States in the printing of newspapers. Chief use is determinable by the use in the United States at, or immediately prior to, the date of importation, in accordance with General Interpretive Rule 10(e)(i) of the General Headnotes and Rules of Interpretation of the Tariff Schedules of the United States, which provides:

> 10(e) In the absence of special language or context which otherwise requires—
>
> (i) a tariff classification controlled by use (other than actual use) is to be determined in accordance with the use in the United States at, or immediately prior to, the date of importation, of articles of that class or kind to which the imported articles belong, and the controlling use is the chief use, i.e., the use which exceeds all other uses (if any) combined;

The Bureau is presently of the opinion that most papers which conform substantially to the following descriptive specifications:

> **Weight:** 500 sheets each 24 by 36 inches not less than 28½ pounds nor more than 35 pounds. **Size:** rolls not less than 13 inches wide and 28 inches in diameter. Sheets not less than 20 by 30 inches. **Thickness:** not over .0042 inch. **Sizing:** time of transudation of water shall be not more than 10 seconds by the ground glass method. **Ash Content:** not more than 6.5 percent. **Color and Finish:** white; or tinted shades of pink, peach or green in rolls; not more than 50 percent gloss when tested with the Ingersoll glarimeter

are of that class or kind of papers chiefly used in the printing of newspapers in the United States and are, accordingly, classifiable as standard newsprint paper under item 252.65, Tariff Schedules of the United States, so long as the existing conditions of chief use prevail.

PAGES IN A ROLL

Newsprint is now being delivered in both English units and metric units. Using the English system, the number of newspaper pages on one side of the sheet in a newsprint roll may be estimated with the following formula:

$$\text{Number of pages} = 432{,}000 \times \frac{A}{(B)\ (C)\ (D)}$$

Where A = Weight of roll in pounds
B = Width of page in inches
C = Length (cutoff) of page in inches
D = Basis weight in pounds (weight of 500 sheets 24 × 36 inches)

*Please refer to footnote.

If newsprint specifications are in metric units and the page width and length are measured in inches, the following formula is useful:

$$\text{Number of pages} = 1{,}550{,}000 \times \frac{A'}{(B)\ (C)\ (D')}$$

Where A′ = Weight of roll in kilograms
B = Width of page in inches
C = Length (cutoff) of page in inches
D′ = Grammage (weight in grams of one sheet measuring one square meter)

*Please refer to footnote.

When all measurements are in metric terms, the following formula applies:

$$\text{Number of pages} = 10{,}000{,}000 \times \frac{A'}{(B')\ (C')\ (D')}$$

Where A′ = Weight of roll in kilograms
B′ = Width of page in centimeters
C′ = Length (cutoff) of page in centimeters
D′ = Grammage (weight in grams of one sheet measuring one square meter)

*Please refer to footnote.

*Multiply the result by 2 to determine the number of printed pages (both sides of the sheet) in a newsprint roll.

Source: ANPA

SUMMARY OF CONVERSION FACTORS

Inches to centimeters	multiply by	2.54
Pounds to kilograms	divide by	2.2046
Short tons to metric tons	divide by	1.1023
Basis weight to grammage	multiply by	1.627
Centimeters to inches	divide by	2.54
Kilograms to pounds	multiply by	2.2046
Metric tons to short tons	multiply by	1.1023
Grammage to basis weight	divide by	1.627

TYPICAL NEWSPRINT ROLL DIAMETERS, METRIC

Inches	Centimeters	Inches	Centimeters
45	114.3	39	99.1
42	106.7	38	96.5
40	101.6	36	91.4

TYPICAL NEWSPRINT ROLL WIDTHS, METRIC

Inches	Centimeters	Inches	Centimeters
60	152.4	34	86.4
59	149.9	32	81.3
58	147.3	31	78.7
56	142.2	30	76.2
55	139.7	29	73.7
		28	71.1

TYPICAL BASIS WEIGHTS, GRAMMAGE

Basis Weight Lbs./Ream	Grammage g/m²	Basis Weight Lbs./Ream	Grammage g/m²
24	39.05	30	48.82
25	40.68	31	50.45
26	42.31	32	52.08
27	43.94	33	53.70
28	45.57	34	55.33
29	47.19	35	56.96

ASSOCIATION MEETINGS

American Newspaper Publishers Association, April 23-25, 1990, Westin Century Plaza, Los Angeles.

ANPA/TEC '90," June 16-20, 1990, Las Vegas Convention Center.

California Newspaper Publishers Association, Feb. 15-18, 1990, Hotel del Coronado, San Diego.

Canadian Daily Newspaper Publishers Association, Sept. 20, 1989, Prince Edward Hotel, Charlottetown, Prince Edward Island; May 2, 1990, Hilton International, Toronto; Sept. 26, 1990, Westin Hotel, Calgary, Alberta.

Inland Daily Press Association, Oct. 22-24, 1989, Drake Hotel, Chicago; March 5-8, 1990, Innisbrook, Tarpon Springs, FL; Oct. 21-23, 1990, Drake Hotel, Chicago.

International Circulation Managers Association, June 24-27, 1990, Hyatt Regency Embarcadero, San Francisco.

International Newspaper Advertising and Marketing Executives, Jan. 7-10, 1990, Marriott Desert Springs, Palm Springs, CA; July 15-18, 1990, Opryland Hotel, Nashville, TN.

International Newspaper Financial Executives, Oct. 22-25, 1989, The Fairmont, San Francisco; May 19-22, 1990, Hilton Head Hyatt, SC; Oct. 14-17, 1990, Fairmont, New Orleans, LA.

International Newspaper Marketing Association, May 20-23, 1990, The Fairmont, New Orleans, LA.

National Newspaper Association, Oct. 25-28, 1989, Hyatt Regency, Atlanta; Sept. 19-23, 1990, Hyatt Regency, Kansas City, MO.

Newspaper Purchasing Management Association, Inc., April 30-May 2, 1990, Buena Vista Palace Hotel, Orlando, FL.

Southern Newspaper Publishers Association, Oct. 15-19, 1989, The Greenbrier, White Sulphur Springs, WV; Sept. 16-19, 1990, The Broadmoor, Colorado Springs, CO.

Suburban Newspapers of America, June 13-15, 1990, Hyatt Regency, San Antonio, TX.

INDEX

CAPACITY:
Canadian Mills 3,4,6
U.S. Mills 4,5,6
North American 6

CONSUMPTION:
World Demand 8
U.S. States & Regions 14,15
Sources of Supply 6,7
U.S., 1958-88 10

METRIC:
Basis Weight, Grammage 10,27
Conversion Factors 27
Pages in a Roll 26
Roll Diameters 27
Roll Widths 27

MISCELLANY:
Association Meetings 28
Basis Weight Grammage 10,25,27
Newsprint and Environment 11
Pages in a Roll 26
Price History 9
Recycling 11
Storage 11
Tariff Classification 24

NEWSPAPERS:
Advertising Volume 24
General Statistics 12
Largest Dailies 13
Largest Newspaper Companies 13
Newsprint as a % of Costs 9
Research, Teenage Audience 16
Research, Advertising Performance 17
Research, Classified 18
Research, Readership 18
Research, Shoppers on the Move 19
Research, Psychographics 20
Research, What Can One Ad Do? 21
Research, Where to Find Out 21
Research, Retail Customer 22
Research, Product Prospects 23
Research, Advertising Exposure 23
Research, Advertising Repetition 23
Research, Reading Public 24

NEWSPRINT INFORMATION COMMITTEE:
Members 2
Research Sponsored 16-24

PRODUCTION:
Canadian and U.S. 6,7,8
Leading Producer Nations 8